



ARIZONA STATE RETIREMENT SYSTEM (ASRS) SERVICE PURCHASE PAYMENT REQUEST

PLEASE PRINT

COMPLETE AND SEND TO:
ASRS - Member Services
PO Box 33910
Phoenix, AZ 85067-3910

Phoenix (602) 240-2000
Tucson (520) 239-3100
Toll-free (800) 621-3778
Fax (602) 240-2003
www.azasrs.gov

Disclosure of your Social Security number is mandated by Section 6109 of the Internal Revenue Code. The ASRS will use Social Security numbers only to obtain information about an individual's ASRS account and to inform the Internal Revenue Service of distributions and withholdings.

INSTRUCTIONS: Submit this form to the ASRS by your cost invoice due date. Multiple forms of payment may be selected. Submit the payment and any required documents to the ASRS no later than the applicable deadline detailed in the Notes section below. A separate *Service Purchase Payment Request* form is required for each cost invoice.

SECTION 1 – Member Information

Social Security Number	Name (Last)	(First)	Daytime Telephone Number ()	
Mailing Address		City	State	ZIP

SECTION 2 – Service Purchase Information

Request ID Number: _____	Years (or Partial Years) to Purchase OR Dollar Value of Intended Payment _____
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SECTION 3 – Payment Options (Check and complete each option you plan to use.)

<input type="checkbox"/> OPTION A Rollover/Transfer See Notes 1 and 5.	<input type="checkbox"/> OPTION B After-tax Check See Notes 2 and 5.	<input type="checkbox"/> OPTION C PDA Payments See Note 3 and 5.	<input type="checkbox"/> OPTION D Termination Pay See Notes 4 and 5. (For retiring or terminating members only.)	
Anticipated Number of Rollovers/Transfers	Check #	Check Amount	Amount Per Pay Period	Retirement Date or Last Day Worked
Member Signature				Date

Notes:

1. Rollover/transfer payments and associated paperwork is due within 90 days of the date your cost invoice was issued. **Initiating pre-tax rollovers/transfers is solely your responsibility.** Follow the enclosed *Direct Rollover/Transfer Certification* form Instructions.
2. After-tax checks payable to the ASRS (personal or cashier) are due by the cost invoice due date or within 30 days of completing a rollover/transfer. After-tax checks cannot be used to purchase political subdivision employment with a U.S. territory, commonwealth, overseas possession or insular area. If you joined the ASRS on or after July 1, 1999, section 415(b) and (c) of the IRC limits the after-tax money you can use to purchase service. Individual limits vary; please consult a tax advisor.
3. The ASRS will mail a *Payroll Deduction Authorization* (PDA) within 7 business days. You must sign and return the PDA within 30 days of the PDA contract date. PDA contracts cannot be set up if you are less than 90 days from retirement. PDA contracts charge 8% interest and may not be for more than 20 years. PDA payments are pre-tax, and must be at least \$10 per payment and purchase at least 0.001 of service per payment.
4. Termination Pay as a form of payment can only be used if you are terminating or retiring within 6 months of the invoice issuance date. You must submit a *Termination Payment Authorization for the Purchase of Service Credit* form to the ASRS **at least three full calendar months** prior to your last work day. It is your responsibility to contact the ASRS to request the form. A full calendar month equals the first through the last day of the month. Termination pay only consists of pre-tax vacation, sick, and overtime pays. The funds must be submitted by your Employer upon termination and payment will be accepted up to a maximum of 6 months from the date your cost invoice was issued. If selected, you cannot submit another request to purchase the same type of service since these funds are issued at or after retirement. Types of eligible service are: Other Public Service (and Other Public Service Non-participatory), Military Service (both active duty and reserve), Forfeited Service, and Leave of Absence.
5. If purchasing Other Public Service and you indicated on your affidavit that you are still eligible for a benefit from the alternate plan or system, you must provide proof that you have refunded that benefit no later than the cost invoice Due Date unless you have also selected 'Option A-Rollover/Transfer' and plan to rollover those funds to the ASRS as a pre-tax payment to purchase the service.

